

Dialing for Dollars, Reinvented

Use phone banks to engage donors and raise more money.

By *Andy Robinson*

When was the last time you picked up your phone, called a donor, and asked for a gift?

Let me guess: Not recently enough.

Sadly, the telephone has developed a poor reputation as a fundraising tool. We're challenged by voicemail, caller ID, people screening calls, donors ignoring their phones altogether – and, of course, all the fears about asking for money.

And yet, there's the power of the human voice – one person actually talking with another, trading stories, and sharing what they care about.

So I was thrilled to learn about a modern spin on the fundraising phone-a-thon – one that embraces new technology and uses it to great advantage.

Fall in Love with Phone Fundraising

Imagine a half-dozen people in remote locations, connected by the online platform Zoom (zoom.us) – so they can see each other, hear each other, and prepare together. Now imagine them all muting their computers, picking up their phones, and calling donors – all at the same time, and in plain sight of each other.

That's the way they do it at Training for Change (trainingforchange.org). We talked to the people there to see why they love phone fundraising and how they help their board, staff, and volunteers participate. Thanks to Zein Nakhoda (staff) and Sonia Silbert (board) for sharing their phone-bank story.



“There's great power in the human voice.”

The Phone Can Build Relationships

Q: Tell us about your group.

A: Training for Change is a training organization for activists and organizers. We believe strong training and group facilitation is vital to building movements for social justice and radical change. We train thousands of people each year across issues and sectors – from holding retreats for community groups to teaching skills for immigrant-rights groups resisting deportation.

Q: Why did you choose phone banking as a fundraising strategy?

A: We have a very relational culture. We value relationships with groups we've worked with, workshop participants, and grassroots donors. Phone banking creates an opportunity to have a personal conversation – to share what's new, learn about our supporters, and ask for donations.

Q: Who did you call? Were they notified in advance?

A: We called recent donors and workshop participants, after announcing the phone bank through our e-news.

Solid Logistics Lead to Success

Q: Describe the logistics of setting up the phone bank through Zoom.

A: We conducted the phone bank using PowerBase (ourpowerbase.net), a web-based donor-management platform. Using PowerBase along with our own database of donors, we were able to create call lists and mark donor responses directly in our records. This required very little data entry.

Before launching the phone bank, we assembled and trained a team of volunteers – board members, trainers, recent donors, and workshop participants – to join us on the phones. We scheduled 12 two-hour call shifts, spread over a month. Most shifts were weekday evenings; some were Saturdays mid-day. A staff member or volunteer leader hosted each shift.

Volunteer callers and hosts joined a Zoom video conference room. We used this platform to provide training, troubleshoot

the donor list, and share progress. When making calls on our phones, we muted ourselves on Zoom but were still virtually and visually together, phone banking as a team.

Train Your Callers!

Q: You're a training organization first and foremost. How did you train your callers?

A: We followed a series of steps:

1. We sent volunteers a short video showing how to use PowerBase.
2. At the start of each shift, hosts demonstrated the software and answered questions.
3. We provided a call script for people to use and adapt. The script included information about our programs, instructions on how to donate, and suggestions for making an ask.
4. After an hour, we did a mid-point check-in to share fundraising totals. Callers also used this check-in time to exchange tips.

Q: How did the call lists work?

A: Call lists were generated through PowerBase. When a volunteer caller signed on, they would see a batch of 15-20 people to call. After each call they would mark the result, such as “Left a voicemail,” “Wrong number,” or “Yes, will donate!”

Callers asked for pledges. We didn't collect credit card information by phone, but rather encouraged people to donate online by credit card or mail us a check.

After each shift we tallied pledges. Staff sent follow-up e-mails to pledgers with a reminder about how to donate.

Measure Your Outcomes

Q: Were you happy with the results?

A: When we first started our fundraising campaign, we set a campaign goal of \$10,000. Before launching the phone bank, we had raised \$3,500 from major donors to kick-start the campaign. We raised an additional \$7,564 through the phone bank, e-news, newsletters, social media, and word of mouth, for a total of \$11,064. Victory! Four out of five donations ranged from \$5 to \$75. So, yes, we were happy with the results.

We were also happy with the way the phone bank sparked the enthusiasm and engagement of people in our organization: 40 volunteers – including every board member and many

“Phone banking creates personal relationships.”

of our trainers – filled 60 caller slots. We called roughly 1,000 people, left a lot of voicemail, and talked with 250 people – a 25% contact rate.

More Conversations = Better Results

Q: Next time, how will you make it better?

A: More conversations, fewer voicemails. One challenge is that donors see the phone number of a volunteer without knowing that we're calling on behalf of Training for Change. We'd like to use more text messages and find other ways to reach potential donors. Some people pledged but never donated. We might encourage them to donate while we have them on the phone, or find other ways to make it easier to follow through.

Together, We're More Effective

Q: What was the best part of the experience?

A: Hosting call shifts through video conference was a blast! Asking for donations can be challenging; doing it as a team gave everyone a confidence boost.

This was also a great tool for skill-building, as callers shared tips in real time. Callers' team spirit sometimes kept them talking on Zoom long after the shift ended. It was fun for them to catch up and share stories with one another.

All in all, phone banking is a great strategy. Try it, and see how it works for you. **S**

Andy Robinson (trainyourboard.com) is a consultant to nonprofit organizations and author of What Every Board Member Needs to Know, Do, and Avoid: A 1-Hour Guide and Train Your Board (and Everyone Else) to Raise Money (co-written with Andrea Kihlstedt).

Get Ready to Raise Funds

For more guidance on asking for money, see articles such as these at NonprofitWorld.org:

The Word You Hear Most Often in Fundraising (Vol. 28, No. 4)

Measuring Outcomes in the Real World (Vol. 30, No. 6)

We Are Made for Story (Vol. 37, No. 4)

Three Keys to Building Relationships in Life (and with Your Donors) (Vol. 38, No. 1)

What to Do When Your Potential Donor Says No (Vol. 36, No. 3)

Getting Comfortable with the F Word: Fundraising & the Nonprofit Board Member (Vol. 20, No. 4)